

Setup Guide

Email Archiving for Microsoft Exchange Server 2000

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1

Introducing Email Archiving for Microsoft Exchange Server

The Email Archiving service stores email messages from a journal mailbox on your Microsoft Exchange Server and associates those messages with user accounts. Users can then log on to the Control Console and view their archived messages. Additionally, Email Archiving allows you to store all of your previously sent and received messages using an historical mailbox.

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- ▶ *The role of envelope journaling in archiving messages*
- ▶ *Associating messages with users in Email Archiving*
- ▶ *Archiving historical messages*

The role of envelope journaling in archiving messages

Email Archiving requires that you enable the envelope journaling feature of your Microsoft Exchange Server.

The journaling feature of Exchange Server creates a copy — or journal — of all email messages that are sent or received by the server. Using envelope journaling ensures that the BCC and distribution list recipients are captured and archived in addition to the primary sender and recipient.

Once journaling is enabled, the Exchange Server then sends copies of all email to a dedicated mailbox called the journal recipient mailbox. From here, the Email Archiving service can retrieve your email and archive it.



Email Archiving stores messages for a user even after that user has been removed from the Active Directory and the Exchange Server.

Associating messages with users in Email Archiving

Email Archiving automatically associates newly archived email messages with user accounts in the Control Console. This process ensures that individual users are able to view their archived messages in the Email Archiving tab of the Control Console. Otherwise, unassociated messages can be viewed by a Customer Administrator.



You can use the **Email Archiving Summary** pane on the **Overview** tab of Email Archiving to view a count of unassociated messages. This can help you troubleshoot problems in the archiving process.

Rules for unassociated messages

An unassociated message is a message that the system cannot link to an existing user account. This means that these messages can only be viewed and managed by customer administrators.

A message can fail to link to a user account for a number of reasons:

- The user account was deleted.
- The user account was created after the message was archived.
- The user account was never created because the email message is historical.



You cannot recreate a user account once it is deleted or re-associate messages to a user account once the account is deleted.

Archiving historical messages

You can also archive older, historical messages in addition to your active mail accounts. This involves a completely different process and does not use journaling.

Historical messages include all of the messages that were on your mail server prior to setting up Email Archiving. In order to archive these messages you can do one of the following:

- Pay for the Managed Import Service. You can ask your sales representative for details.
- Upload historical messages by setting up a designated historical mail source in the Control Console. There is no extra charge.

If you choose to upload historical messages, you should complete these activities:

- Create a user mailbox on the Exchange Server and place your historical messages into the inbox.
- Set up a Historical Mail Source in the Control Console and connect it to your historical mailbox.
- Enable the Historical Mail Source and messages placed into the inbox of your historical mailbox are automatically imported into Email Archiving. Once they are archived, your messages are then deleted from the mailbox. Messages in subfolders, however, are not imported.

For more information view the *Email Archiving Administrator Guide* or the Control Console Online Help.



Do not turn on journaling for your historical mailbox.

A known limitation in Exchange Server affects Historical Data

A limitation exists in Microsoft Exchange that might cause some messages to remain effectively invisible to end users in Email Archiving. This limitation affects Exchange 2003 and earlier versions.

This issue specifically affects customers who are using SaaS Email Archiving Historical Data Hosting with historical data that originated from Exchange 2003 or earlier. In these instances historical data is imported without the SMTP address information which is needed for associating email messages to user accounts.

What can cause missing SMTP address data?

Some historical messages do not contain SMTP address data for email recipients which can result in possible side-effects, including:

- Affected messages do not associate to end users because X.400 addresses, instead of SMTP addresses, are present in the message header. SMTP addresses are required by SaaS Email Archiving for end user association to occur.
- Customer Administrator or Compliance Officer role archive searches by SMTP address will not work because SMTP addresses are not present in the original message and therefore cannot be indexed. This issue does not prevent messages from being archived so affected messages can be located by other search criteria.

There are two scenarios where messages might be missing SMTP address data:

- An internal recipient sends a message to one or more other internal recipients and the data is later exported using .pst export (using Outlook or EXMERGE). This is because exporting to .pst does not force Exchange to perform an X.400 to SMTP address translation.
- An internal recipient sends a message to one or more other internal recipients and the data is imported into SaaS Email Archiving using IMAP or POP, but the internal participant's Active Directory account is no longer present. As a result, the X.400 to SMTP address mapping cannot take place.

These early versions of Exchange rely primarily on X.400 addressing and SMTP addressing is only used for messages that traverse the SMTP, POP, or IMAP services. Therefore, internal messages exported to .pst do not translate to SMTP addressing and messages for users that no longer exist in the Active Directory cannot be mapped to their SMTP addresses.

Workaround for historical data imports

If you are importing historical data into SaaS Email Archiving from Exchange 2003 or earlier, be sure that:

- The email is exported to SaaS Email Archiving using POP or IMAP.
- Make sure that there is a valid Active Directory account containing a matching X.400 address (to what is in the historical email), and at least one valid SMTP address for each user if you want end user association or SMTP address searching.

2

Getting Started

Your environment needs to include specific software to work with Email Archiving. Review these requirements and recommendations before setting up your Exchange Server.

Contents

- ▶ *Supported versions of Exchange Server 2000*
- ▶ *Exchange Server 2000 requirements*
- ▶ *Before you begin the setup process*

Supported versions of Exchange Server 2000

You should have one of the following versions of Exchange Server 2000 to support Email Archiving.

- Microsoft Exchange Server 2000 Standard Edition
- Microsoft Exchange Server 2000 Enterprise Edition
- Microsoft Small Business Server with Exchange Server 2000 Standard Edition

Exchange Server 2000 requirements

You should install the required service packs, hotfixes, and tools prior to setting up journaling.

Install the following:

- Exchange Server Service Pack 3
- Exchange 2000 Update Rollup for envelope journaling (870540)
- Email Journaling Advanced Configuration tool (exejcfg.exe)

You can download the required service packs and tools at: <http://www.microsoft.com/downloads/search.aspx?displaylang=en>

Use the instructions on the Microsoft download pages for additional instructions.

Before you begin the setup process

Be sure to complete the following tasks before setting up the journaling feature in Exchange Server.

- You must add your users on the Control Console before you set up Email Archiving and the journaling feature of Exchange Server.



When you configure and enable Email Archiving before adding users to the Control Console, only the Customer Administrator role is able to search for and view archived email.

- You should check with your Firewall/Intrusion Prevention System vendor to verify that the Email Archiving service IP space is able to communicate with your network.
- Running a mixed Exchange Server environment is not recommended or supported. Interoperability limitations between different versions of Exchange Server can adversely affect journaling.
- The maximum message size that Email Archiving can store is 50 MB. Larger messages remain in the journal mailbox and are not archived. As a result, we recommend setting the maximum message size in Exchange Server to 50 MB as well. For more information, consult the Microsoft Exchange Server documentation.
- IMAP is the recommended protocol for all setup activities in Email Archiving.

3

Set up a journal recipient mailbox

A journal recipient mailbox in Exchange Server is required for Email Archiving.

Task

- 1 On the Exchange Server desktop, select **Start | Programs | Administrative Tools | Active Directory Users and Computers**
- 2 Connect to the domain where the journal mailbox will reside.
- 3 Right-click the name of the organization where you want to create the mailbox and click **New**, then **User**.
- 4 In the **New Object - User** window, type the following:

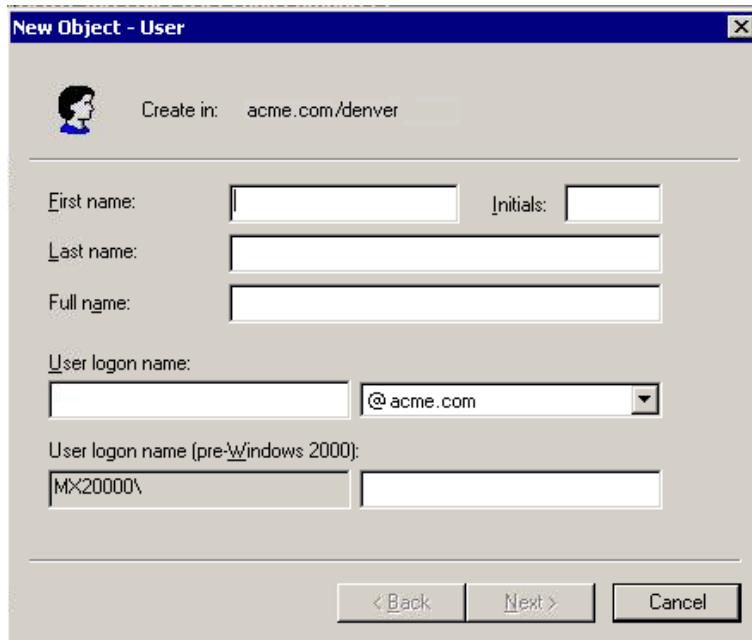


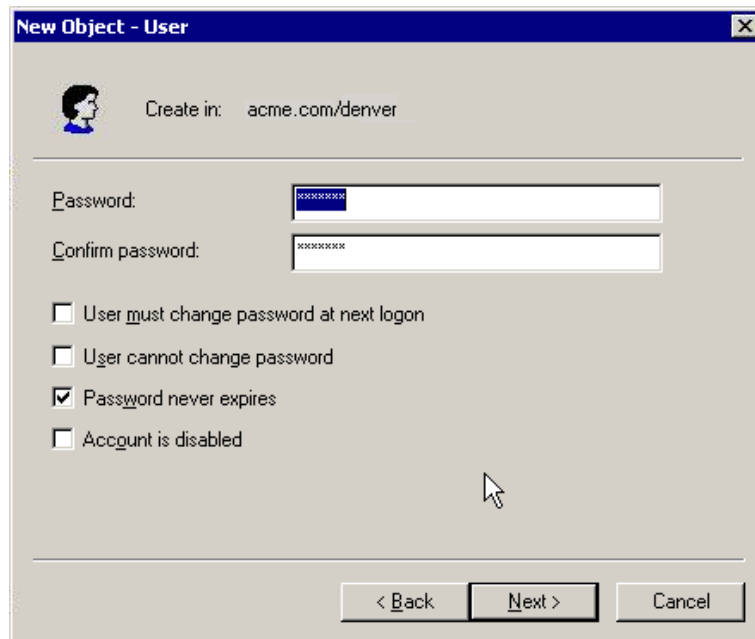
Figure 3-1 New Object - User window: Create log on

Option	Definition
First name	Type Journal.
Last name	Type Mailbox.
Full name	Enter a single text string name for the mailbox. For example, type journalmailbox.
User login name	Enter a user name for the mailbox, for example examplejournalmailbox.



You will use this same login information when you add the journal mailbox as a mail source in Email Archiving.

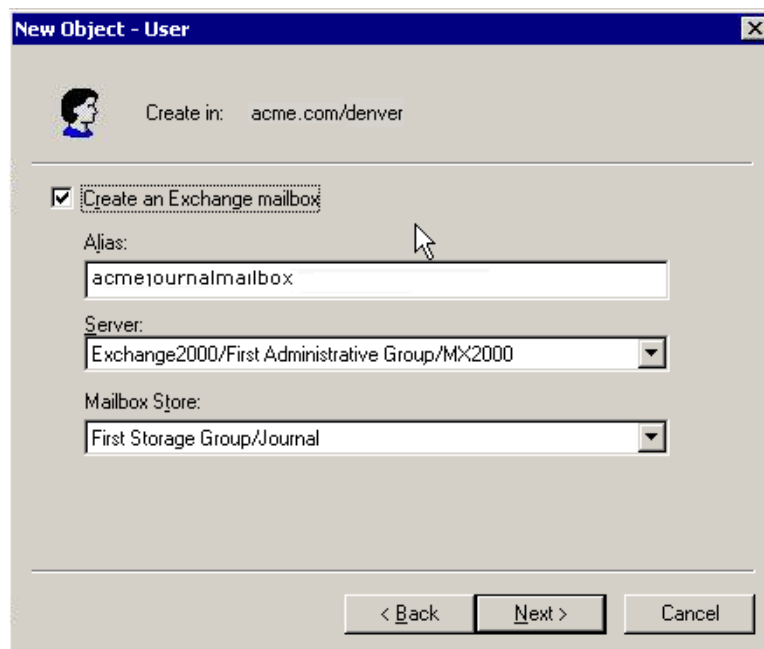
- 5 Click **Next**.
- 6 Set and confirm the password.



The 'New Object - User' dialog box is shown. At the top, it says 'Create in: acme.com/denver'. Below this, there are two text boxes for 'Password:' and 'Confirm password:', both containing 'xxxxxxx'. There are four checkboxes: 'User must change password at next logon' (unchecked), 'User cannot change password' (unchecked), 'Password never expires' (checked), and 'Account is disabled' (unchecked). At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Figure 3-2 New Object - User: Set password

- 7 Select **Password never expires**.
If necessary, deselect all other options.
- 8 Click **Next**.
- 9 Select **Create an Exchange mailbox** and then select the **Server** and **Mailbox** store.



The 'New Object - User' dialog box is shown. At the top, it says 'Create in: acme.com/denver'. Below this, there is a checked checkbox for 'Create an Exchange mailbox'. Underneath, there are three text boxes: 'Alias:' with 'acmejournalmailbox', 'Server:' with 'Exchange2000/First Administrative Group/MX2000', and 'Mailbox Store:' with 'First Storage Group/Journal'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Figure 3-3 New Object – User window: Select Create an Exchange mailbox

10 Click **Next**.

11 Click **Finish**.

The journal recipient mailbox now appears in your user list in **Active Directory Users and Computers**.

4

Enable standard email journaling

Locate the mailbox store and enable journaling.

Task

- 1 In **Exchange System Manager**, click **Servers**.
- 2 Select the active server.
- 3 In the list, locate the storage group that contains the mailbox store.
- 4 Click the plus sign next to the storage group name to expand the display.
- 5 Right-click the mailbox store and then click **Properties**.
- 6 From the **General** tab, select **Archive all messages sent or received by mailboxes on this store**.

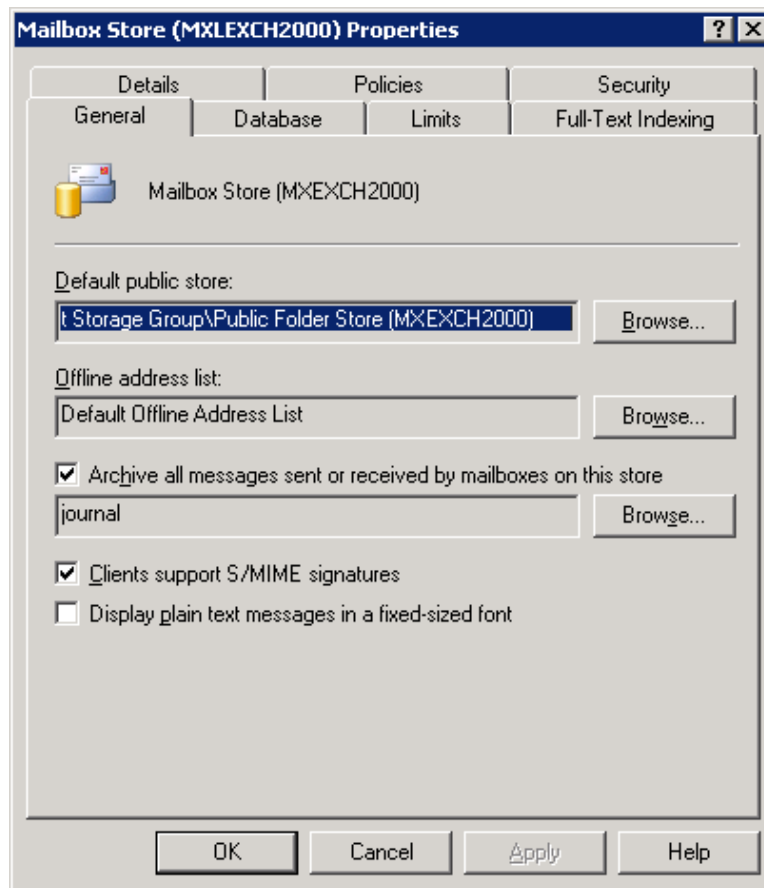


Figure 4-1 Mailbox Store Properties window – General tab

- 7 Click **Browse** to select your mailbox store.

- 8 Double-click the name of the journal recipient mailbox you created earlier.

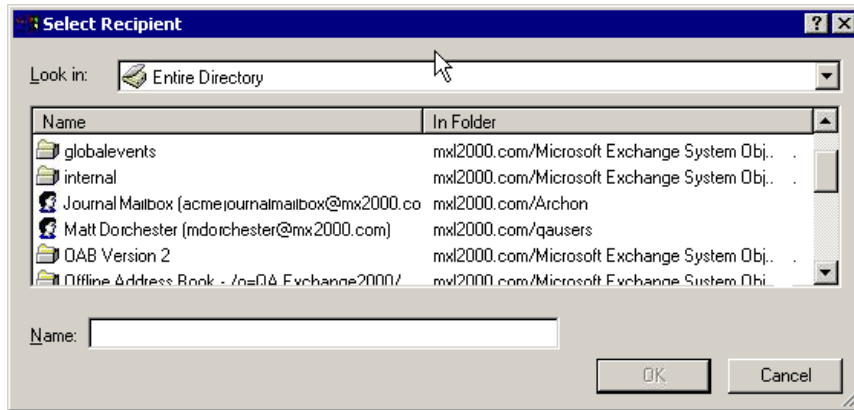


Figure 4-2 Select Recipient window

For example, double-click **journal mailbox**.

- 9 Click **OK** and then click **OK** again.

Repeat to enable standard journaling for each of your mailbox stores. If you want to archive all messages in your Exchange environment, you must enable standard journaling on every mailbox store (with the exception of the mailbox store that contains your journal recipient mailbox).

Once you have set up your mailbox stores, you must complete two additional tasks:

- Turn on envelope journaling on the server.
- Delete messages from the Journal Mailbox.

After you enable standard journaling, but before you turn on envelope journaling, messages may begin to flow into your journal mailbox. These messages are not formatted correctly and must be deleted.

Messages that are journaled after you enable envelope journaling are formatted correctly and can remain in the journal mailbox.

Tasks

- [Enable envelope journaling on the server](#) on page 16
Use the **exejcfg.exe** tool to manually enable envelope journaling for the journal mailbox.
- [Delete incorrectly formatted messages from the Journal Mailbox](#) on page 17
Manually delete all of the messages in the journal mailbox that were copied into the mailbox before envelope journaling was enabled.

Contents

- [Enable envelope journaling on the server](#)
- [Delete incorrectly formatted messages from the Journal Mailbox](#)

Enable envelope journaling on the server

Use the **exejcfg.exe** tool to manually enable envelope journaling for the journal mailbox.

Before you begin

You should set up your journal recipient mailbox and enable standard email journaling before completing this task.

Task

- 1 Download and unzip the `exejcfg.exe` tool.
- 2 Open a command prompt and navigate to the directory where you unzipped `exejcfg.exe`.
- 3 At the prompt, type `exejcfg -e`.

The system displays the following message when envelope journaling is successfully enabled:
Successfully ENABLED the Email Journaling Advanced Configuration feature

- 4 To verify, type `exejcfg -l`.

The system displays a confirmation.

You should now delete messages from the journal mailbox that were copied before envelope journaling was enabled.

Delete incorrectly formatted messages from the Journal Mailbox

Manually delete all of the messages in the journal mailbox that were copied into the mailbox before envelope journaling was enabled.

Before you begin

Set up your journal recipient mailbox, enable standard email journaling, and enable envelope journaling before completing this task.

Task

- 1 Log on to the journal mailbox with Webmail or a preferred email client.
Use the user name and pass you assigned the journal mailbox during set up.



If you have forgotten the password, change the password the journal mailbox and use the new one.

- 2 Select all of the messages in the journal mailbox and delete them.
- 3 *Immediately* log off.

Enable standard email journaling

Delete incorrectly formatted messages from the Journal Mailbox

5

Prevent mail from going directly to the journal mailbox

Remove the journal recipient mailbox from the Global Address List in order to keep it from receiving mail directly. The journal mailbox should only be used for archiving purposes.

Task

- 1 In **Active Directory Users and Computers**, double-click the name of the journal recipient mailbox.
- 2 Select the **Exchange Advanced** tab.

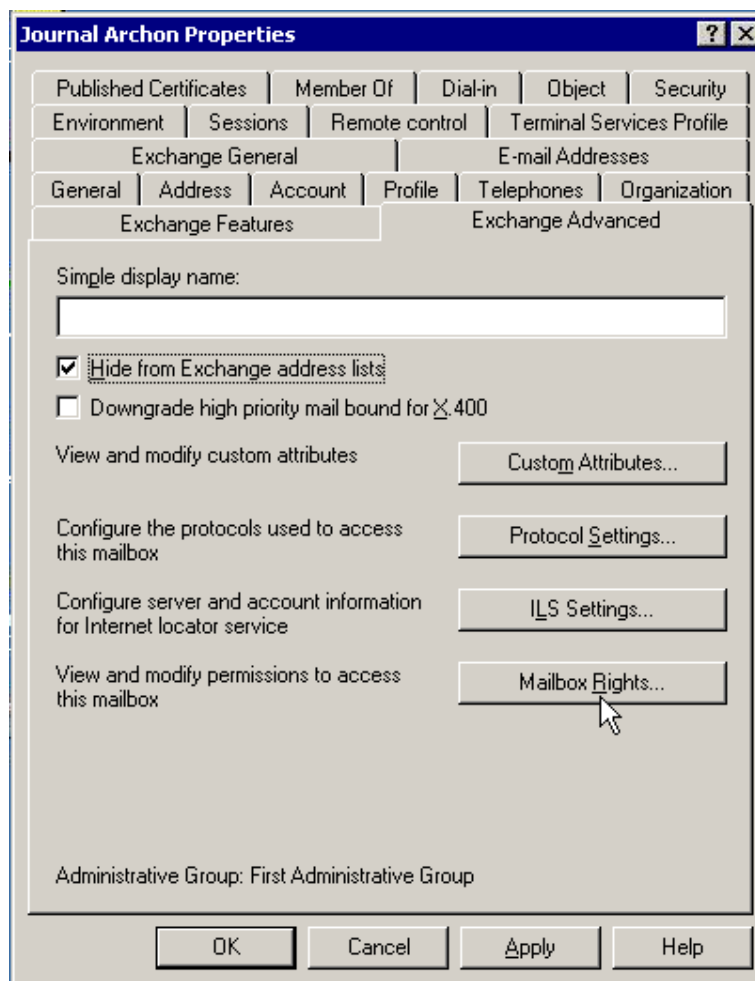


Figure 5-1 Mailbox properties window — Exchange Advanced tab

If the **Exchange Advanced** tab is not available, you need to enable it.

- a Return to the **Active Directory Users and Computers** list.
 - b Right-click the organization unit where the journal mailbox exists.
 - c Select **Properties** | **View** | **Advanced Features**.
- 3 On the **Exchange Advanced** tab, select **Hide from Exchange address lists** and click **OK**.
 - 4 Return to **Active Directory Users and Computers** and double-click the **user login name** you added for the journal mailbox.
For example, double-click **examplejournalmailbox**.
 - 5 Select **Exchange General** | **Delivery Restrictions** | **Only From** to set the delivery restriction.

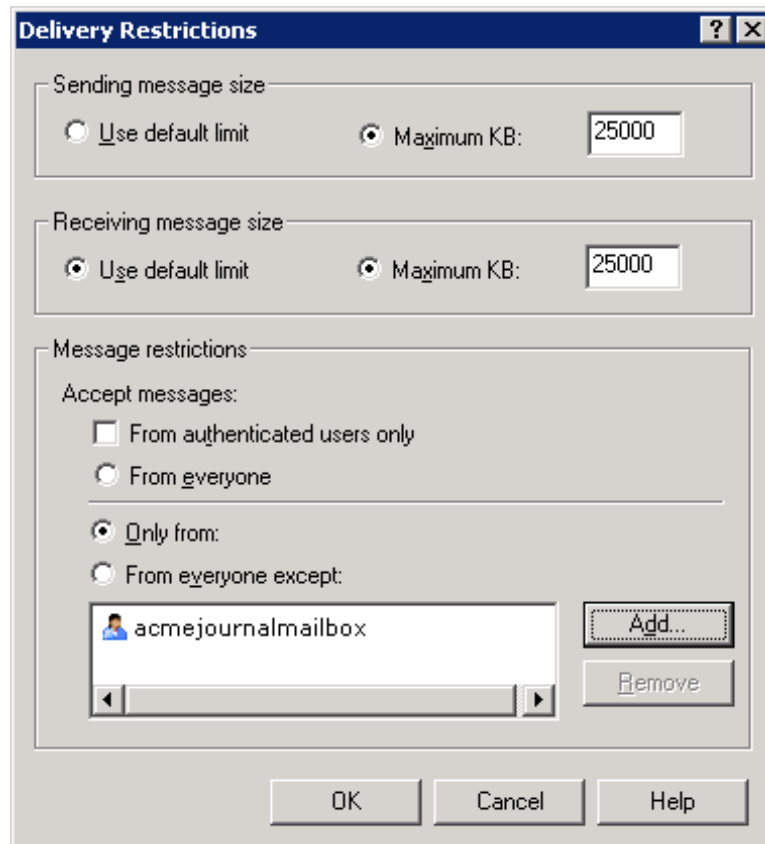


Figure 5-2 Delivery Restrictions window

- 6 Click **Add**.
- 7 Type the name of the journal recipient mailbox, and then click **OK**.
For example, type **journalmailbox**.

The journal user appears in the dialog box.
- 8 Click **OK** to close the **Delivery Restrictions** dialog box.

6

Remove storage limits on the journal mailbox

Although Email Archiving removes messages from the journal mailbox after they have been archived, there may be delays. This can cause a temporary buildup in the journal mailbox. If you have previously set a limit to the size of the journal mailbox, this setting might inadvertently cause messages to be removed before they can be archived. As a result, you should consider removing storage limits that can affect the journal mailbox.

Before you begin

Set up your journal recipient mailbox before completing this task.

Task

- 1 In **Active Directory Users and Computers**, double-click the **user login name** you added for the journal mailbox. For example, double-click **examplejournalmailbox**.
- 2 Select **Exchange General | Storage Limits** to remove file size limits from the journal mailbox.

- 3 From the **Storage Limits** dialog, deselect all fields to ensure that there are no storage limits.

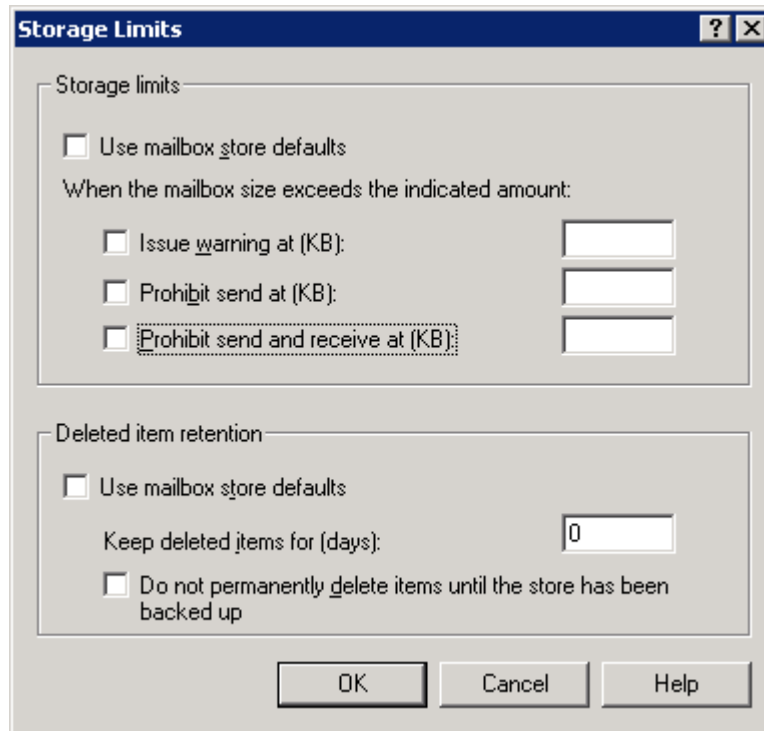


Figure 6-1 Storage Limits window - Deselect all fields

- 4 Click OK.

7

Setting up TLS on Exchange Server

Transport Layer Security (TLS) is an encryption protocol that provides secure communications on the internet for such things as web browsing, email, internet faxing, instant messaging, and other data transfers. Email Archiving supports TLS, allowing you to enhance the security of your outbound journaled email messages. Using TLS is not required.

Email Archiving uses a TLS certificate to authenticate your Exchange Server. It then automatically accepts the encrypted messages as they are transported from Exchange Server, decrypts the messages, and then stores them using a 256-bit encryption method.



You can find detailed information about setting up TLS for Exchange Server on the Microsoft website.

Contents

- *Create and manage key certificates for TLS*
- *Set TLS encryption levels for the server*

Create and manage key certificates for TLS

Add an X.509 server certificate to begin configuring TLS.



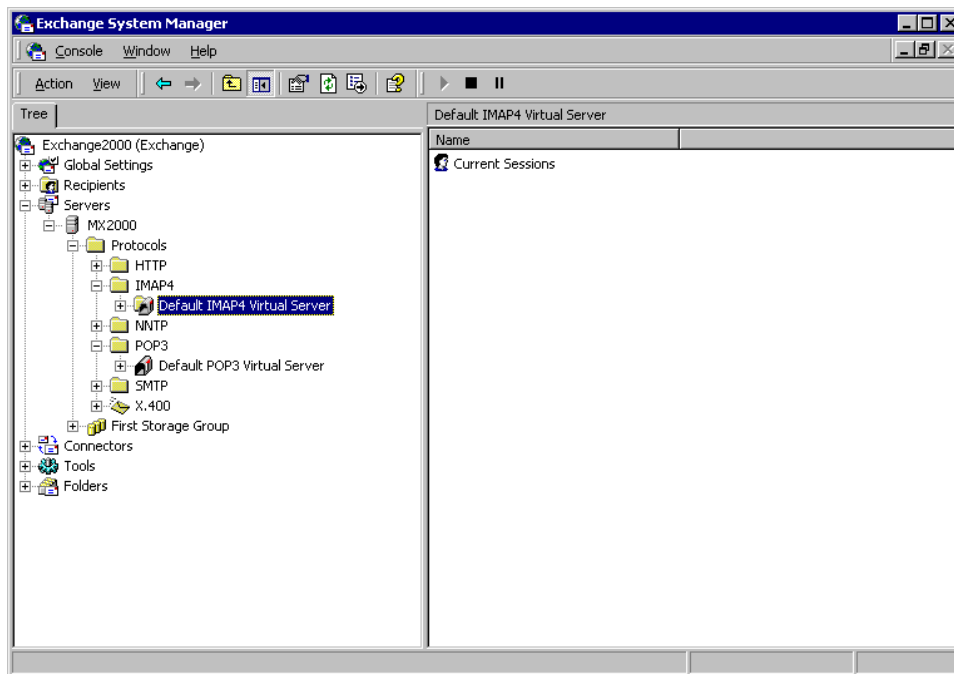
IMAP is the recommended protocol for all setup activities in Email Archiving.

Task

- 1 Install an X.509 server certificate on the server.

For more information about X.509 certificates, view the Microsoft Knowledge Base:

319574 (<http://support.microsoft.com/kb/319574/>) *How to use certificates with virtual servers in Exchange 2000 server.*

2 Start Exchange System Manager.**Figure 7-1 Exchange System Manager window****3 Expand the name of the Exchange Server and select Protocols | IMAP4 | Default IMAP4 Virtual Server | Properties.**

- 4 Select the **Access** tab and then click **Certificate** to set up new key certificates as well as manage key certificates that are installed for the IMAP virtual server.

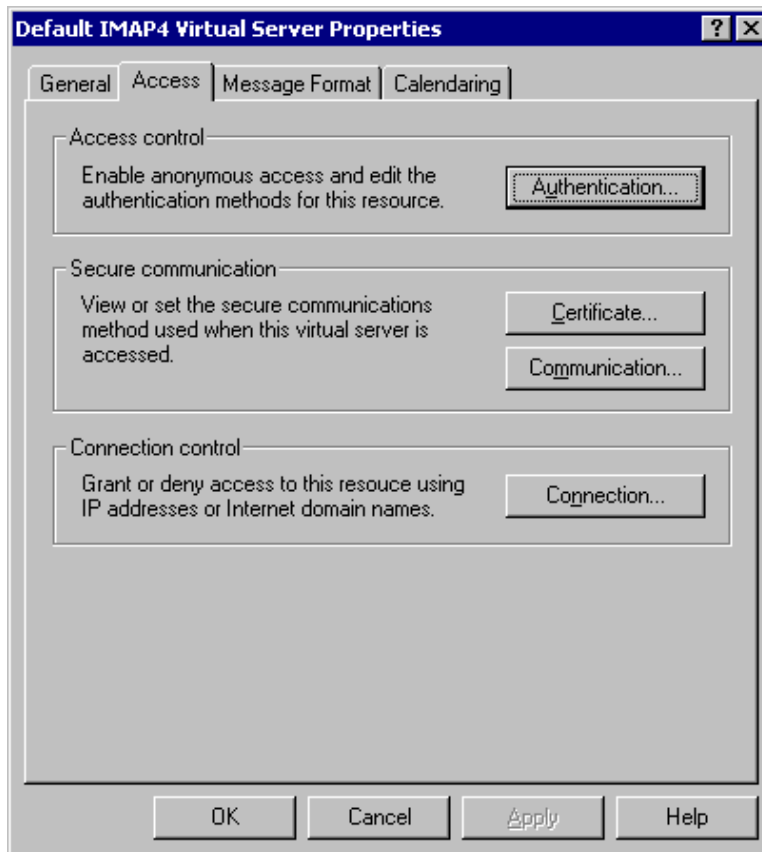


Figure 7-2 Default IMAP4 Virtual Server Properties window — Access tab

- 5 On the **Welcome to the Web Server Certificate Wizard** window, click **Next**.

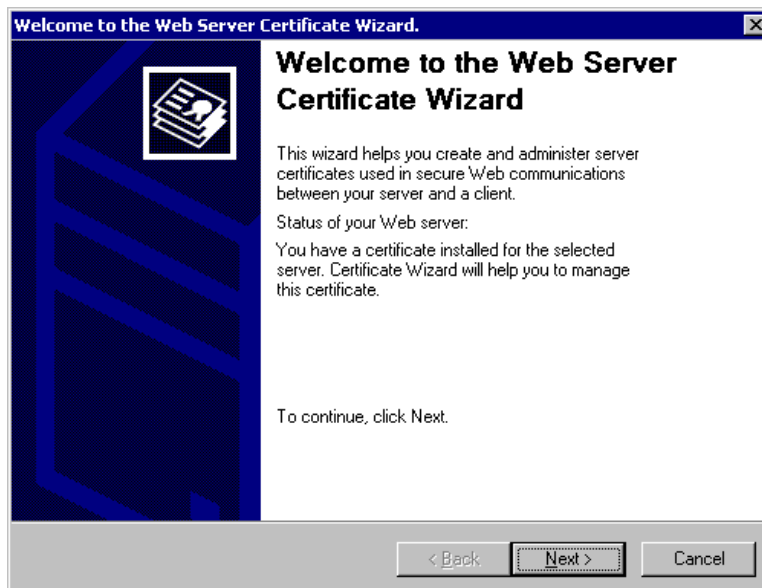


Figure 7-3 Web Server Certificate Wizard window

- 6 On the **Modify the Current Certificate Assignment** window, select **Renew the current certificate** and then click **Next**.

- 7 On the **Server Certificate** window, select **Assign and Existing Certificate** and then click **Next**.
- 8 Select the server name and then click **Next**.
- 9 On the **Certificate Summary** window, click **Next**.
- 10 On the **Completing the Web Server Certificate Wizard** window, click **Finish**.

Repeat for the POP3 protocol.

Set TLS encryption levels for the server

Complete the process for TLS setup.

Task

- 1 Start Exchange System Manager
- 2 Right-click the **Default IMAP4 Virtual Server**, and then click **Properties**.
- 3 Select the **Access** tab and then click **Authentication**.
- 4 Select **Basic Authentication**.
- 5 Select **Integrated Windows Authentication**.
- 6 Click **OK**.

